APPLYING LIMITS TO REPORTS

When you first see the home page, you may want to limit data on the underlying reports. The reports will only allow you to see the data you have been given access to in the Financial data warehouse. If you have access to large amounts of data, you may want to place limits on the data to only view the most relevant information.

Limits allows the narrowing of data that will be presented on the report or pivot and ensuring only the data the user is interested in is presented.

1. First determine the limits you want to apply, remember you can limit yourself out of data.

2. To select a limit, <click> on the drop down box below the limit header.

3. To select multiple limits within the same drop down, hold the CTRL key down and <click> each limit so that multiple choices can be selected. The figure below shows multiple items selected for the program limit.

4. Once you have selected all the limits. <click> on the Apply Limits button.

5. Once you have completed this, the underlying data on all reports will now be limited based up the choices you have made.

6. To see the currently applied limits, scroll to the review the Active Limits box at the bottom of the home page.